



महाराष्ट्र शासन



वीण समृद्धीची



INDIAN TECHNICAL TEXTILE
ASSOCIATION
VOICE of Indian Technical Textile Industry

TECHNICAL TEXTILES

Maharashtra's Strategic
Pathway to **Viksit Bharat**
and a **Trillion-Dollar Economy**

Our Undertaking

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Contents

Executive Summary	10
Section 1: Technical Textile Industry at a Glance	13
Section 2: Global and Domestic Market Outlook	17
Section 3: Trends Driving Technical Textiles	21
Section 4: Government Support for Strengthening the Technical Textile Ecosystem in India	26
Section 5: Maharashtra's Competitive Advantage in Technical Textiles	32
Section 6: Maharashtra's Strategic Focus Areas for Addressing Key Industry Challenges	39
Section 7: Roadmap to a Trillion Dollar Opportunity through Viksit Maharashtra 2047 Vision	44



Shri. Devendra Fadnavis
Hon'ble Chief Minister
Maharashtra



Mantralaya, Mumbai 400 032



सत्यमेव जयते

Devendra Fadnavis
Chief Minister
Maharashtra

CMO/PR/574/2026
Date: 07th July, 2026

MESSAGE

Maharashtra has long been a leader in India's industrial and textile growth. As one of the country's foremost textile-producing states, the sector remains a key driver of manufacturing, exports, and employment. After agriculture, textiles are the second-largest employment generator in the State, supporting millions of livelihoods and making a substantial contribution to Maharashtra's economic development.

The global textile industry is now undergoing a major transformation, with technical textiles emerging as one of its fastest-growing segments. Their applications across infrastructure, healthcare, agriculture, mobility, defence and environmental protection are redefining textiles from traditional manufacturing to advanced, technology-driven solutions. This trend offers Maharashtra a distinctive opportunity to leverage its manufacturing strengths and lead India's next wave of industrial expansion.

Recognising this potential, Maharashtra became the first state in India to launch the Maharashtra Technical Textiles Mission (MTTM), underscoring its commitment to building a globally competitive technical-textiles ecosystem. To complement this vision, the State is developing six Technical Textile Parks and creating an enabling environment that fosters innovation, research, entrepreneurship, skill development and investment across the value chain.

Our ambition goes beyond expanding manufacturing capacity. We aim to build an ecosystem where innovation converts into enterprise, research yields commercially viable solutions, and skilled talent drives globally competitive industries. The success of technical textiles will be measured by the quality of employment generated, the technologies developed, and Maharashtra's contribution to India's manufacturing leadership.

I commend the Department of Textiles, Government of Maharashtra, for producing this Thought Leadership publication and extend my best wishes for Bharat Tex 2026. I am confident that the ideas, partnerships and investments arising from this platform will further strengthen Maharashtra's position as a leader in technical textiles and make a significant contribution to the vision of Viksit Maharashtra and Viksit Bharat 2047.

(Devendra Fadnavis)

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Shri. Eknath Shinde
Hon'ble Deputy Chief Minister
Maharashtra



Mantralaya, Mumbai 400 032



Eknath Sambhaji Shinde
Deputy Chief Minister
Maharashtra

07 JUL 2026

Message

At the outset, I extend my best wishes to the Department of Textiles, Government of Maharashtra, for representing the State as the Supporting State at Bharat Tex 2026. The event has emerged as an important platform for bringing together governments, industry, academia and innovators to showcase India's textile capabilities and strengthen collaboration across the sector.

The Government of Maharashtra remains committed to building a textile sector that is inclusive, sustainable and globally competitive. Through the Integrated and Sustainable Textile Policy 2023-2028, the State is creating an enabling environment for balanced regional development, investment, entrepreneurship, technology adoption and employment generation. Our vision is to strengthen the entire textile value chain while ensuring that the benefits of industrial growth reach every region of Maharashtra.

Technical textiles are creating new opportunities and as global demand shifts towards high-performance, sustainable and application-oriented products, Maharashtra's strong manufacturing base, skilled institutions and entrepreneurial ecosystem provide a strong foundation to emerge as a leader in this evolving sector. Continued investment in research, innovation, skill development and industry collaboration will be key to unlocking this potential and building long-term competitiveness.

I congratulate the Department of Textiles for bringing together this thought leadership report, which reflects the growing importance of technical textiles in India's development journey. I am confident that it will encourage meaningful dialogue, stronger partnerships and new opportunities for market penetration helping position Maharashtra as a preferred destination for innovation, advanced manufacturing and technical Textiles.

(Eknath Sambhaji Shinde)



Smt. Sunetra Ajit Pawar
Hon'ble Deputy Chief Minister
Maharashtra



DEPUTY CHIEF MINISTER
MAHARASHTRA STATE

Date: 07 July, 2026

MESSAGE

The textile sector is entering an exciting phase of transformation, driven by technological innovation, sustainable manufacturing, modern production processes and expanding global opportunities. As India strengthens its position in the global textile value chain, technical textiles have emerged as a strategic growth area with applications across infrastructure, healthcare, mobility, agriculture, defence and environmental protection. With its strong industrial ecosystem and significant contribution to the country's manufacturing sector, Maharashtra is well positioned to lead this transformation.

For Maharashtra, this opportunity extends beyond manufacturing. It is about creating an ecosystem that encourages research, innovation and skill development while strengthening industry competitiveness. The State remains committed to improving infrastructure, facilitating investments, enhancing logistics and fostering stronger collaboration between industry, academia and research institutions. Equally important is preparing a future ready workforce equipped with the knowledge and skills required for advanced manufacturing and emerging technologies. Together, these efforts will strengthen indigenous innovation, promote sustainable manufacturing and create greater value across the textile value chain.

As Maharashtra's Department of Textiles represents the State at the prestigious **Bharat Tex** Expo in New Delhi, I extend my heartfelt congratulations and best wishes to all the stakeholders associated with this initiative. Bharat Tex provides an important platform for government, industry, academia and innovators to exchange ideas, build meaningful partnerships and showcase India's growing capabilities to the world. I am confident that the discussions and collaborations emerging from this platform will further strengthen Maharashtra's textile ecosystem and reinforce its position as a leading destination for technical textiles, innovation and sustainable manufacturing.

Smt. Sunetra A.
(Sunetra Ajit Pawar)



Shri. Sanjay Savkare
Hon'ble Minister of Textile
Maharashtra

Dhanyavaad. Jai Hind!

Shri. Sanjay Savkare

Hon'ble Minister of Textile

Maharashtra

Date:



Message

The textile sector remains one of the strongest pillars of Maharashtra's industrial growth, making a substantial contribution to manufacturing, employment generation, and regional development. As the global industry increasingly moves towards innovation, sustainability, and value-added manufacturing, technical textiles have become one of the fastest-growing segments, creating new opportunities throughout healthcare, infrastructure, defence, agriculture, and mobility. Maharashtra is committed to creating an enabling ecosystem that strengthens innovation and global competitiveness.

It gives me immense pleasure to participate in Bharat Tex for the third consecutive year. The platform has become an important forum for decision-makers, industry, researchers, and entrepreneurs to exchange ideas, showcase innovations, and identify new opportunities. Stakeholder discussions and industry interactions continue to grant valuable insights that help shape the future of the textile sector.

The Government of Maharashtra is strengthening the textile ecosystem through the Integrated and Sustainable Textile Policy 2023–28, which promotes balanced regional development, technology upgradation, and environmentally friendly manufacturing. The Policy provides capital assistance of up to 45% for textile enterprises, along with an additional 5% subsidy for women-led enterprises, members representing marginalized communities, and ex-servicemen. To encourage environmentally responsible manufacturing, financial assistance of up to ₹5 crore is provided for Effluent Treatment Plants (ETPs) and up to ₹10 crore for Zero Liquid Discharge (ZLD) systems.

Maharashtra is also the first State in India to launch the Maharashtra Technical Textiles Mission (MTTM), a major initiative that aims to strengthen research, innovation, entrepreneurship, skill development, industry-academia collaboration, and market development to build a globally competitive technical textiles ecosystem.

As Maharashtra enters this next phase of growth, I invite industry leaders, investors, entrepreneurs, research institutions, and academia to partner with us to build a globally competitive technical textiles ecosystem. The Department of Textiles remains dedicated to creating a policy environment that stimulates innovation, facilitates investment, and supports the growth, ensuring Maharashtra continues to lead India's technical textiles transformation.



Smt. Anshu Sinha, I.A.S
Principal Secretary, Textiles
Co-operation, Marketing and Textiles Department
Government of Maharashtra



Anshu Sinha
Principal Secretary

Co-operation, Marketing & Textiles Dept.
Mantralaya, Mumbai 400 032.

Dated :

MESSAGE

The textile industry remains a cornerstone of India's manufacturing sectors, contributing 2.3% to GDP, 13% to industrial output, and 12% to the country's exports, while providing employment to nearly 45 million people. Within this ecosystem, technical textiles have become one of the fastest-growing segments, driven by innovation, sustainability, and expanding applications across all categories.

Maharashtra has consistently played a leading role in India's textile growth through its strong manufacturing base, industrial ecosystem, and progressive policy framework. Through the Integrated and Sustainable Textile Policy 2023-28, the State intends to attract ₹25,000 crore in investments, generate 5 lakh employment opportunities, increase cotton processing capacity from 30% to 80% creating an enabling ecosystem for upcoming-generation of textile manufacturers.

The Department of Textiles continues to focus on strengthening the entire value chain by promoting investment, research, technology adoption, skilling, and stronger partnerships among industry, academia, and research institutions. These efforts are further complemented by the Maharashtra Technical Textiles Mission, India's first dedicated State Mission for technical textiles, which seeks to accelerate innovation, commercialization, and advanced manufacturing.

We are pleased to participate in Bharat Tex once again, having served as the Knowledge Partner last year and the Supporting State Partner this year. The platform provides an excellent opportunity to interact with industry, exchange ideas, and establish meaningful partnerships. Last year, Maharashtra facilitated the signing of multiple MoU's, and we look forward to encouraging many more joint efforts that contribute to the State's industrial growth.

I hope this Thought Leadership report serves as a useful resource for policymakers, industry, researchers, and investors, and encourages greater collaboration to build a globally competitive technical textiles ecosystem for Maharashtra and India.


Anshu Sinha



Mr. Kanishk Maheshwari
Co-Founder & Managing Director,
Primus Partners



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Technical textiles are reshaping the future of the global textile industry. With applications spanning infrastructure, healthcare, mobility, agriculture, defence, and sustainability, they represent one of the most promising avenues for industrial growth and innovation.

Maharashtra is well positioned to lead this transformation. Its strong manufacturing base, progressive policy framework, vibrant textile ecosystem, and focus on research and innovation provide a solid foundation for building a globally competitive technical textiles sector.

This thought leadership brings together industry perspectives, market trends, policy insights, and practical recommendations to support informed decision-making and strengthen the technical textiles ecosystem. I hope it serves as a valuable resource for policymakers, industry leaders, researchers, entrepreneurs, and investors. I am confident that the collective efforts of all stakeholders will further strengthen Maharashtra's leadership in advanced and technical textiles.

Kanishk Maheshwari
Co-Founder and Managing Director
Primus Partners Private Limited



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Executive Summary

Technical textiles are emerging as one of the fastest-growing segments of the global textile industry, driven by increasing demand from sectors such as healthcare, mobility, infrastructure, agriculture, defense and industrial manufacturing. As countries diversify supply chains, invest in advanced manufacturing and accelerate sustainable industrial development, technical textiles are increasingly being recognised as a strategic sector that supports economic growth, industrial competitiveness and export expansion..

India has made significant progress in strengthening its technical textile ecosystem through initiatives such as the National Technical Textiles Mission (NTTM), the Production Linked Incentive (PLI) Scheme and PM MITRA Parks. Backed by a large textile manufacturing base, growing domestic demand and favourable policy support, the country has the potential to become an important player in the global technical textile value chain. However, challenges such as low domestic penetration across key application areas, dependence on imported specialty materials, limited testing and certification infrastructure, fragmented manufacturing and skill gaps continue to constrain the sector's growth and global competitiveness.

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Mr. Mahesh Kudav
ITTA Chairman

Technical textiles mark India's shift from volume-driven textile manufacturing to value-driven, innovation-led production. Maharashtra's integrated ecosystem spanning across manufacturing, research, and industrial demand positions it to lead this transformation. As the sector scales, sustained collaboration between industry, academia, and government will be key to establishing India as a globally competitive hub for technical textiles.

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Within this evolving landscape, Maharashtra is uniquely positioned to drive India's next phase of growth in technical textiles. The State combines a strong textile manufacturing base with a diversified industrial economy, well-developed logistics infrastructure, leading research institutions, established engineering and chemical industries, and a large concentration of end-use sectors. The launch of the Maharashtra Technical Textile Mission (MTTM) further reinforces the State's commitment to developing an integrated ecosystem for research, innovation, manufacturing, skill development, market development and exports.



Bridging ecosystem gaps in innovation, testing, certification, skill development and specialty materials will be critical to unlocking the sector's full potential.

The Maharashtra Technical Textile Mission provides a dedicated platform to accelerate ecosystem development.

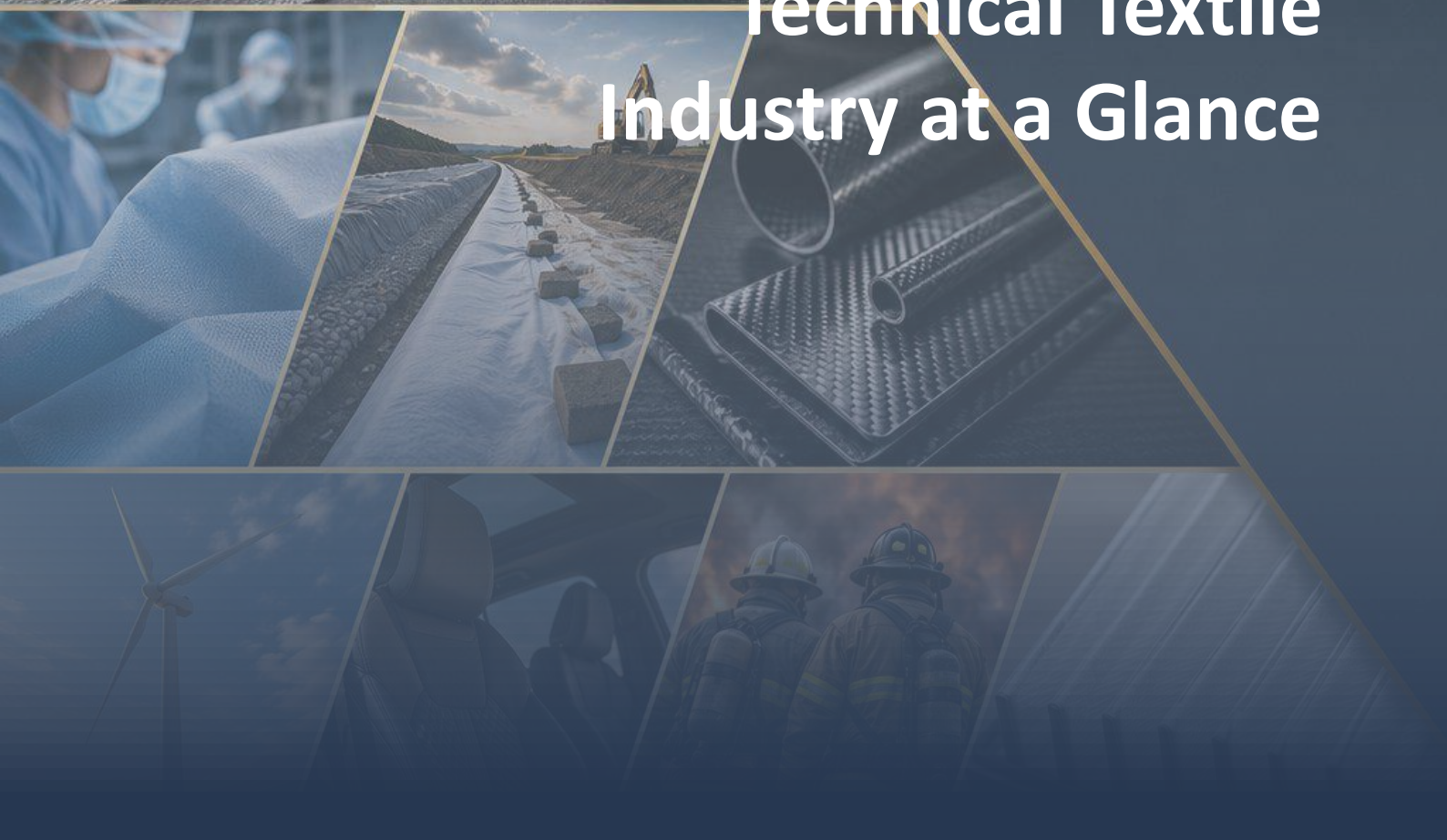
This Thought Leadership report examines the global and domestic technical textile landscape, assesses India's current position, and highlights Maharashtra's competitive advantages in building a robust technical textile ecosystem. It identifies the key structural challenges that need to be addressed and outlines strategic interventions to accelerate investment, innovation, market adoption and exports. The report presents a roadmap for strengthening Maharashtra's position as a leading technical textile hub while contributing to India's vision of becoming a globally competitive manufacturing economy.





01

Technical Textile Industry at a Glance



Section 1

Technical Textile Industry at a Glance

Technical textiles are textile materials and products manufactured primarily for technical performance and functional properties rather than aesthetic characteristics. It has applications extending across various industries, including automobiles, civil engineering and construction, agriculture, healthcare, industrial safety, and personal protection.

The industry is a rapidly growing segment of the textile industry worldwide, sustained by advances in materials and manufacturing, and by increasing demand across industries. The global technical textiles market is projected to reach approximately USD 274 billion by 2027, growing at a CAGR of around 5.1% during 2020–2027.¹

TECHNICAL TEXTILES AT A GLANCE

Key Metrics: India vs Global

METRIC	INDIA (LATEST AVAILABLE)	GLOBAL (LATEST / FORECAST)
 Market Size (USD bn)	 ~USD 29 bn (2024)	 ~USD 225.6 bn (2026), projected to reach USD 315.8 bn by 2033
 Global Rank	 5th largest technical textiles market	 China, USA, EU lead globally
 India's Share in Global Technical Textile Trade (%)	 ~3–4% (approx., based on trade estimates)	 --
 CAGR (India Market)	 ~8–10% (recent years, industry estimates)	 ~4–5% CAGR globally
 Major Segments (India)	 • Meditech • Agrotech • Mobitech • Protech • Geotech	 • Non-wovens • Hygiene textiles • Composites • Construction textiles

Technical textiles, a sunrise sector, account for approximately 13% of India's total textile and apparel market, contributing 0.7% to India's GDP and supporting a vast array of other industries. The global growth rate of technical textiles will increase at approximately 4.9% from 2030². Currently, the penetration of technical textiles in India is only around 5–10%, significantly lower than the 30–70% in developed countries. To³ narrow this gap and position India as a global leader in technical textiles, the Central Government has rolled out several initiatives, such as the National Technical Textiles Mission (NTTM) and the Production-Linked Incentive (PLI) Scheme. These aims are to promote domestic production and expand the textile industry's value chain.

Based on their functional requirements and end-use applications, the technical textiles have been grouped into 12 categories. The list of products as per the Baseline Study submitted to the Ministry of Textiles by IIT Delhi⁴ is listed below:



Agrotech:

Textiles used in agriculture, horticulture, fishing, and forestry. Examples: shade nets, crop covers, fishing nets, etc..



Buildtech:

Textiles used in construction. Examples- Scaffolding nets, awnings, wall coverings, etc.



Clothtech:

Technical textiles for clothing applications, such as fabric treated under pressure and high temperature. Examples- Coated laces, interlinings, zip fasteners, labels, etc.



Geotech:

Permeable fabric woven or non-woven, used for confinement/ separation, reinforcement, filtration, and drainage. Examples- Geotextiles, Geomembranes, Geostrips, and Geo-grids



Hometech:

Textiles used in a domestic environment and interiors. Examples: Fiber fill, blinds fabrics, mosquito nets, and furniture fabric



Indutech:

Textiles used for chemical and electrical applications and textiles related to mechanical engineering. Examples: conveyor belts, bolting cloth, coated abrasives, composites, etc.



Meditech:

A Combination of textile technology and medical sciences has resulted in a new field called medical textiles. Examples: Diapers, wipes, surgical sutures, hernia mesh, artificial ligaments, etc.



Mobiltech:

Textiles used in the manufacture of automobiles, railways, and aircraft. Examples: tire cord, seat belt webbing, airbags, insulation felts, seat covers, etc.



Oekotech:

Textiles used in environmental protection applications. Examples: Geomembranes, geosynthetic clay liners, etc.



Packtech:

Textiles used in packaging, silos, containers, bags, canvas covers, marquee tents. Examples: Leno bags, soft luggage, jute hessian and sacks, shopping bags, etc.



Protech:

Textiles that are used in protection against heat, flame, and radiation for firefighter clothing, against molten metals for welders, for bulletproof jackets, etc. Examples: bulletproof jackets, fire-retardant apparel, chemical-protective clothing, etc.



Sportech:

Shoes, sports equipment, flying and sailing sports, cycling, winter and summer sports, indoor sportswear. Examples: Sport composites, artificial turfs, parachute fabrics, sleeping bags, etc

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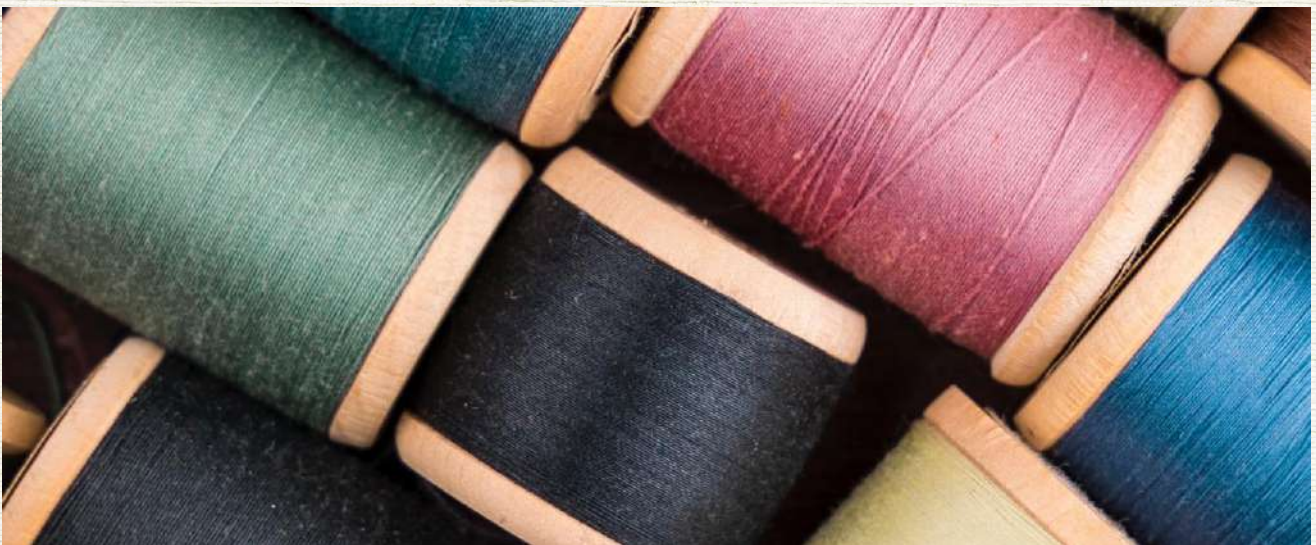


Dr. Prasanta Kumar Panda
Assistant Director
Bombay Textile Research Association
(BTRA)

Geosynthetics (core category of technical textiles) are engineered polymeric materials used in civil engineering and environmental projects to improve the performance, durability, and sustainability of infrastructure. They include geotextiles, geomembranes, geogrids, geonets, and geocells, each designed for functions such as reinforcement, separation, filtration, drainage, and containment. By enhancing soil stability and reducing the need for natural construction materials, geosynthetics help conserve resources and lower project costs. They also minimize environmental impacts by controlling erosion, protecting groundwater, and extending the lifespan of roads, railways, landfills, canals, and retaining structures. Their use reduces carbon emissions associated with excavation, transportation, and maintenance, making them an important component of sustainable construction practices.

As urbanization and climate challenges increase, geosynthetics provide resilient and cost-effective solutions for infrastructure development. By combining engineering efficiency with environmental responsibility, they play a vital role in building safer, longer lasting, and more sustainable infrastructure for present and future generations.

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02

Global and Domestic Market Outlook

Section 2

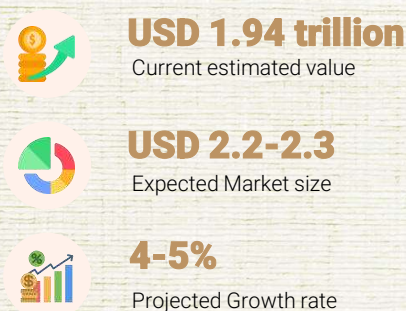
Global and Domestic Market Outlook

Technical textiles are emerging as a key lever of industrial development in India, offering functionality-oriented applications characterized by durability, protection, and filtration used in medicine and defence, distinct from traditional textiles driven largely by consumer demand fashion trends. This change is strategic and largely shaped by global supply chains transitioning toward sustainability, resilience, and advanced manufacturing.

The change has been to step away from volume-driven, labour-intensive textile trade toward more value-driven, application-based, and specialty-oriented production. The Global Technical Textile market is expected to grow by 5.2% between 2022-2027, reaching USD 274 Bn by 2027⁵. The growth has been stimulated by the increase in adoption of non-woven products, medical disposables, high-performance composites, and construction textiles, particularly as compliance requirements strengthen and sustainability standards form the core of this new-age textile development.

2.1 | Global Textile Market

Technical textiles, as a segment within the textile ecosystem, have been considered a technical edge in developing the industrial and economic competitiveness of the future.



Global textile industry⁶⁻⁷

This has been dominated by key players such as China, Germany, and the United States of America. China leads in scale, integrated supply chains, and man-made fibers. On the other hand, the United States of America and Germany lead in specialized industrial applications and innovation-led segments.

India's opportunity does not lie in commodity competition, but in presenting itself as a globally competitive supplier in emerging technical categories where demand is structurally resilient, and margins are higher.

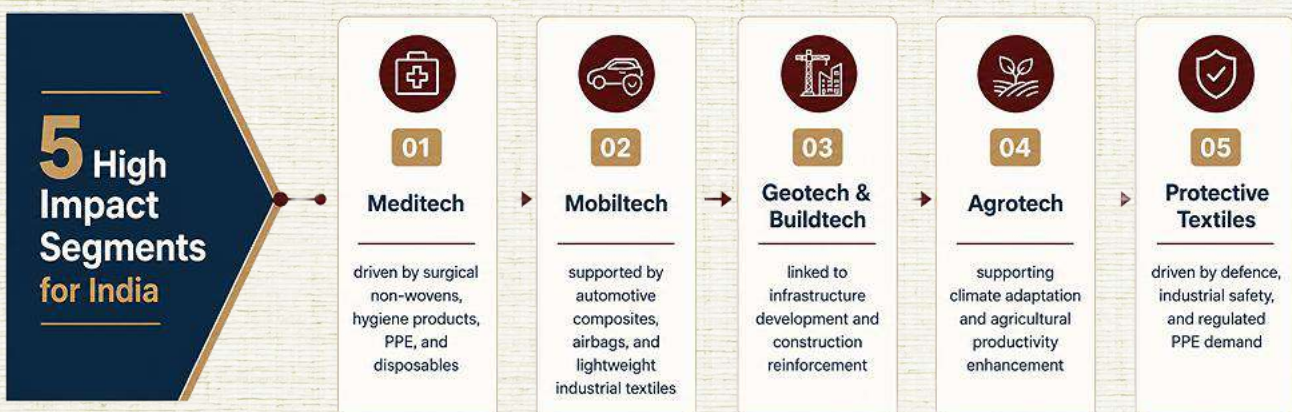
2.2 | India's Textile Economy: Scaling upwards and how?

As we shift our perspective to a global scale, we can take a glance at India's market scope for the textile and apparel ecosystem, which employs over 45 million people and plays a major role in industrial output and exports. The textile and Apparel market is projected to reach USD 350 billion by 2030, with exports targeted at USD 100 billion. India has been ranked among the top 6 exporters of textiles and apparel worldwide (as per the PIB report 2025), underscoring the need to expand into this high-value segment. The sector has been contributing nearly 2% to India's GDP, around 13 -14% to overall industrial output in the country, 11% manufacturing GVA as of August 2025. The textile sector is expected to double its contribution to GDP to 5% by the end of the decade.

2.3 | Technical Textiles as India's High Growth Lever

Technical textiles represent a structurally resilient and high-value growth segment. Scaling this segment will require specialized skilling pipelines through ITIs and Centers of Excellence, congruent with industry justification and placement needs. India's technical textiles market was valued at USD 29 billion in 2024 and is expected to reach approximately USD 45 billion⁸ by the end of 2026, making it the fifth largest globally, with strong expansion potential driven by industrial demand throughout.

Industry projections indicate that technical textiles could benefit from India's textile and apparel exports, which remained stable at ~USD 37.54 billion in 2025, accounting for 12-13% of total exports. However, India's share in global trade of textiles and apparel stands at ~3.9%⁸, highlighting its role as a strong force in India's textile export upgrade. Global fiber demand is expected to reach nearly 149 million tons by 2030⁹, driven by population growth and rising per capita consumption. India's intention is clear: diversification beyond cotton-led commodity exports and acceleration into engineered, application-driven textile categories where margins, compliance requirements, and long-term demand stability are structurally higher India's near-term opportunity is concentrated in five high-impact segments



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Shri Ravi Singh
Deputy Director
The Synthetic & Art Silk Mills Research
Association (SASMIRA)

Technical textiles are no longer just about fabrics they're about creating smart, high-performance solutions for real-world needs. For India, the real opportunity lies in moving beyond volume and focusing on innovation and strong research. The next phase of growth will be driven by advanced functional materials, sustainability, and AI-led innovation. With the right mix of research support, industry efforts and policy backing, we can build global leadership in this space. Technical textiles will be key to driving the next phase of industrial growth.

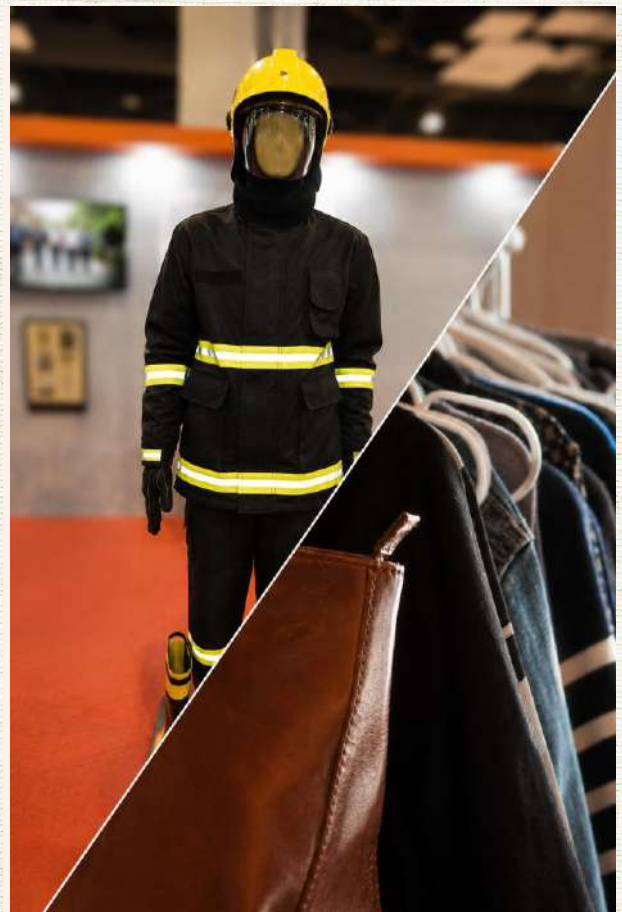
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2.4 | Competitive Leap Beyond Apparel

Compared with peer exporters such as Bangladesh and Vietnam, which have largely scaled through labor-intensive apparel, India's next competitive leap lies in seizing the engineered-textile sector. Technical textiles require deeper integration of R&D, certification systems, polymer capabilities, advanced processing, and focused skilling initiatives to create a future-ready workforce.

While India is already a major textile exporter, technical textile exports are still underexplored. Sources have suggested export estimates at only USD 2–3 billion¹⁰, indicating considerable untapped potential relative to global demand. Scaling the segment will depend not only on industrial competitiveness but also on specialized skilling and workforce readiness.

The evolution of technical textiles as an industrial infrastructure, from the conventional dependence on fabric in fashion, has witnessed a structural and mindset-oriented shift. For India, this is not only an opportunity to leverage the existing market space and grow the technical textiles segment, but also a tactical pathway to climb the global textile value chain and solidify long-term export leadership.





03

Trends Driving Technical Textiles



SUSTAINABILITY



INNOVATION



ADVANCED
MANUFACTURING



SMART SOLUTIONS



PERFORMANCE



FUTURE READY

Section 3

Trends Driving Technical Textiles

The FTA was signed in May 2025 and came into effect at a time when India needed a push to drive its exports. India's technical textile exports to the UK are around USD 136 million. The FTA, which addresses pricing, product specifications, regulatory coordination, and facilitation, will increase India's textile and apparel exports to the UK manifold ¹¹. Textile exports contribute the highest value to the UK, and technical textiles hold a huge potential. Man-made staple fibres, man-made yarns, and fabrics are major components of the technical textile basket.

3.1 | Global Market Opportunities





India-UK Free Trade Agreement (FTA)

The FTA signed in May 2025, came in at the moment when India needed a push to drive its exports. India's technical textile exports to the UK are around USD 136 million. The FTA addressing the pricing, product specifications, regulatory coordination, and facilitation will increase India's textile and apparel exports to the UK by manifold. Textile exports contribute highest by value to the UK and technical textiles hold a huge potential. Man made staple fibres, manmade yarns and fabrics form major components of the technical textile basket.



India-European Union FTA

The India-EU Free Trade Agreement (FTA), announced in January 2026, grants India zero-duty access to the EU's \$263.5 billion import market for textiles, including technical textiles. India currently exports around \$7-\$8 billion in textiles to the EU, with technical textiles (Meditech, Protech) positioned for significant growth alongside major shares in apparel (60%) and cotton (17%)¹².

 Healthcare & Hygiene Infection management, surgeries, hospital textiles, anti-microbial barriers etc.	 Infrastructure & Construction Safety gear, geotextiles for stable constructions, protection, filtration.
 Sportswear & Protective Apparel Growing demand of fitness gear, temperature regulation, lightweight, sweat/moisture management, breathability, sun protection.	 Automotive & Mobility Protective gear, finesse, fuel efficient, providing thermal insulation, fire resistance, specialised fabrics for impacts absorption.
 Home care & Furnishings	 Packaging & Covers
 Environmental related	 Agriculture & related



India- New Zealand FTA

The India-New Zealand Free Trade Agreement, signed in 2026 after the conclusion of negotiations in late 2025, provides duty-free access for all Indian goods entering New Zealand, creating new export opportunities for labour-intensive sectors such as textiles and apparel. The agreement is expected to improve India's access to the Oceania market, diversify export destinations and enhance the global competitiveness of Indian textile products¹³.



Trump Economics

Recent U.S. trade policy changes have reshaped global textile trade flows by encouraging buyers to diversify sourcing beyond traditional manufacturing hubs. This presents an opportunity for India to strengthen its position in the U.S. market, particularly in value-added and technical textile products¹⁴.

3.2 | Evolving Demand of Consumers and across Key end use Industries

End Use Industry	Key Applications
 Healthcare	Surgical gowns, PPE kits, masks, wound care products, hygiene products, implants
 Agriculture	Shade nets, crop covers, mulch mats, fishing nets, agro textiles
 Infrastructure & Construction	Geotextiles, geogrids, geomembranes, roofing membranes, erosion control
 Automotive	Airbags, seat belts, tyre cords, insulation materials, automotive composites
 Defence & Protection	Bullet-resistant jackets, flame-resistant clothing, protective uniforms, helmets
 Industrial	Conveyor belts, filtration fabrics, coated fabrics, industrial wipes, insulation materials
 Packaging	FIBC bags, woven sacks, flexible packaging materials
 Sports & Fitness	Sportswear, artificial turf, performance fabrics, parachutes
 Environment	Geomembranes, filtration media, erosion control products, environmental protection textiles

Evolving Demand of Consumers and across Key end use Industries

3.3 | Innovation in Materials & Technology

Technical textiles are evolving through continuous development in materials and manufacturing technologies. The focus has moved towards developing high-performance fibres, smart textiles, composite materials and functional finishes that improve durability, strength, protection and product performance among multiple applications.



3.4 | Focus on Sustainability

Sustainability is becoming a key driver of innovation in technical textiles. Manufacturers are increasingly using recycled PET bottles, industrial plastic waste, post-consumer textiles, and biologically derived fibres to produce high-performance technical textile products. These recycled materials are widely used in geotextiles, non-wovens, filtration media, automotive textiles, packaging textiles, and construction applications.

Alongside recycled raw materials, manufacturers are adopting water-efficient processing, cleaner production technologies, and circular manufacturing practices to reduce waste, improve resource efficiency, and meet global sustainability standards, strengthening their competitiveness in export markets.¹⁵

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Vinit Parekh
Founder
International Fashion Business Exchange
Council (IFBEC)

A trillion-dollar opportunity demands a trillion-dollar mindset. Technical textiles represent the next industrial paradigm, and Maharashtra already possesses the raw ingredients to lead it: the clusters, the institutions, the talent and the ports. What our roadmap now requires is structured industry cohesion and systemic modernization. By seamlessly connecting advanced research, digital trade and sustainable production into a unified ecosystem; we can bridge the gap between localized MSME clusters and global B2B value chains. Transforming these fragmented networks into globally competitive hubs for advanced textiles is exactly how we will lead the industry forward. Ultimately, this strategic alignment will drive both high-tech innovation and critical zero-waste solutions, ensuring that our growth is measured not just in revenue, but in true resilience.

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GOVERNMENT SUPPORT

-  POLICIES & INCENTIVES
-  INFRASTRUCTURE DEVELOPMENT
-  INDUSTRIAL PARKS & CLUSTERS
-  SKILL DEVELOPMENT
-  RESEARCH & INNOVATION
-  EASE OF DOING BUSINESS

SUPPORTING
INDUSTRY
GROWTH

04

Government Support for Strengthening the Technical Textile Ecosystem in India



INCENTIVES



INFRASTRUCTURE



INDUSTRIAL
DEVELOPMENT



SKILLING



R&D SUPPORT



SINGLE WINDOW
CLEARANCE

Section 4

Government Support for Strengthening the Technical Textile Ecosystem in India

Given the importance of technical textiles, the Government of India has introduced a series of targeted policy initiatives to strengthen domestic manufacturing capabilities, promote innovation, and integrate India into global value chains.

Some of the key policy initiatives by the Government of India are:

4.1 | National Technical Textiles Mission (NTTM)

The National Technical Textiles Mission (NTTM), launched by the Government of India in 2020 with an outlay of ₹1,480 crore, serves¹⁶ as the flagship initiative to accelerate the growth of the technical textiles sector.

The mission is structured around four key components:



Four Key Components of National Technical Textiles Mission (NTTM)

4.2 | Production Linked Incentive (PLI) Scheme for Textiles

The PLI Scheme for Textiles, with a financial outlay of ₹10,683 crore, aims¹⁷ to encourage large-scale investments in man-made fibre (MMF) apparel, MMF fabrics, and technical textile products.

Key objectives of the scheme include:

- Expanding domestic production capacity in technical textiles
- Promoting scale-driven manufacturing
- Encouraging global players to establish manufacturing bases in India
- Improving India's export competitiveness in high-value textile segments

By incentivizing incremental production and investment, the PLI scheme is expected to secure significant inflows and facilitate technology upgrades across the textile value chain.

4.3 | PM MITRA Mega Textile Parks

The PM Mega Integrated Textile Region and Apparel (PM MITRA) Parks Scheme has been launched to establish world-class textile manufacturing clusters across India.

These parks aim to create integrated textile ecosystems with:

- Plug-and-play infrastructure
- Common processing facilities
- Effluent treatment plants
- Logistics and warehousing infrastructure
- Skill development centers

The integrated cluster approach is especially useful for technical textiles, as it reduces fragmentation in the supply chain and increases efficiency in fiber production, processing, finishing, and product manufacturing.



4.4 | Standardization and Regulatory Framework

To support the development of technical textiles, the government has also focused on strengthening standards and quality frameworks.

The Bureau of Indian Standards (BIS) has introduced mandatory quality standards for numerous technical textile products, specifically in sectors such as:

- Geotextiles used in road construction
- Agro-textiles used in agriculture
- Protective textiles for industrial safety

These standards assure duct reliability while enabling Indian manufacturers to meet international compliance requirements¹⁸.

4.5 | Infrastructure and Processing Support

The government has also introduced initiatives to strengthen textile production infrastructure through programs such as the Integrated Processing Development Scheme (IPDS).

These schemes support:

- Modern processing units
- Environmentally sustainable dyeing and finishing facilities
- Effluent treatment infrastructure
- Technology upgradation in textile processing

Such efforts are important for technical textiles, where performance characteristics depend heavily on advanced finishing and chemical processing competencies¹⁹.



4.6 State-Level Policy Initiatives

Several states have introduced dedicated policy strategies to strengthen technical textile manufacturing by promoting investment, integrated infrastructure, technology adoption and skill development²⁰.



“

Indian Technical Textiles industry is fast building a vibrant ecosystem by strengthening resilient, sustainable, and innovation-led technical textile manufacturing hubs, contributing significantly to Viksit Bharat Vision. The Indian Technical Textiles market is projected to grow from ₹1.22 lakh crore in FY 2019–20 to ₹1.99 lakh crore by FY 2025–26 (projected), registering an overall CAGR of approximately 8.4%, reflecting the sector's robust growth and expanding industrial significance with many segments showing a sustained higher growth trajectory. From healthcare and infrastructure to agriculture, mobility, defense, and environmental sustainability, technical textiles deliver high-performance solutions that enhance productivity, safety, and quality of life, across the sectors and throughout the country. As India strengthens its advanced manufacturing capabilities led by AI, Innovation, research, and higher value addition, technical textiles will play a pivotal role in achieving the vision of Atmanirbhar Bharat and will establish the country as a preferred global sourcing destination and innovation hub for technical textiles. Through sustained collaboration among industry, academia, research institutions, and the continued focused policy thrust of the Union and State Government, India is well-positioned to record exponential growth and emerging as a global leader in Technical Textiles.

**Indian Technical Textile
Association (ITTA)**

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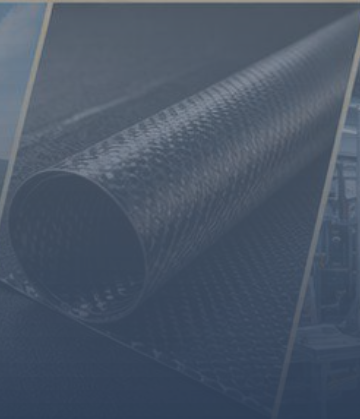




05



Maharashtra's Competitive Advantage in Technical Textiles



Section 5

Maharashtra's Competitive Advantage in Technical Textiles

India's technical textile sector has reached an important stage in its evolution. While the country has established itself as one of the world's largest producers of textiles and apparel, the next phase of growth will increasingly be determined by innovation, high-performance materials, advanced manufacturing and application-driven products rather than conventional textile production alone. Technical textiles therefore represent one of India's most significant opportunities to move up the global textile value chain and build long-term industrial competitiveness.

Within this national opportunity, Maharashtra possesses a distinct competitive advantage. The State combines a mature manufacturing ecosystem, strong industrial demand, research capabilities, logistics infrastructure, progressive policy support and one of India's largest textile industries. Rather than relying on a single competitive factor, Maharashtra offers an integrated ecosystem capable of supporting the complete technical textile value chain - from fibre and polymer manufacturing to product development, testing, commercialization and exports.



5.1 | Structural Strength: Fibre Ecosystem and Manufacturing Base

India has a strong fibre ecosystem globally with leadership in cotton production, which is projected to reach 7.2 million tonnes (~43 million bales of 170 kg each) by 2030, and production capacity in silk and polyester. The country's expansive raw material scope reduces dependency on imports and provides a firm base for scaling engineered and advanced textile technologies. Maharashtra complements India's strong fibre ecosystem with a mature manufacturing base, established textile clusters, robust logistics, and proximity to high-growth end-use industries such as automotive, healthcare, infrastructure, agriculture and defence. This integrated ecosystem positions the State as a natural hub for high-value technical textile manufacturing and exports.

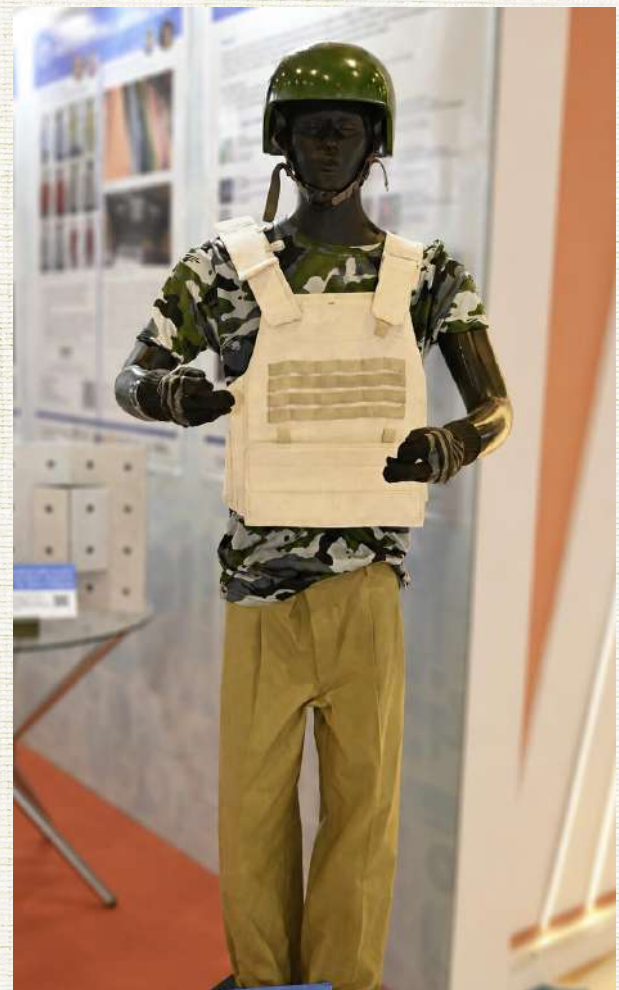
India provides the raw material advantage → Maharashtra converts that advantage into industrial competitiveness.

5.2 | Capturing India's Growing Market and Export Opportunity

India's technical Textile market is valued at ~USD 45 billion, in 2026 expected to grow at a CAGR of 6.1 – 12%, depending on the targeted industry application, driven by strong domestic demand across industry and end-use sectors. While exports have been rising, they remain largely underpenetrated relative to global demand. This is indicative of significant headroom for India to expand its market across high-value, application-driven technical textile categories.

5.3 | Strong Manufacturing Base

Maharashtra has historically been one of India's leading textile manufacturing states. The presence of established textile clusters, integrated processing capabilities, engineering industries and MSMEs provides a strong foundation for scaling technical textile manufacturing. These textile clusters are diversifying beyond apparel into non-woven and functionality-oriented technical textiles. The growth of this segment is driven by fibre inputs, processing capability, quality control systems, and proximity to end-use markets.



5.4 | A Diversified Industrial Economy Creates Natural Demand for Technical Textiles

Unlike conventional textiles, technical textiles are largely driven by industrial demand rather than consumer fashion trends. Consequently, the strongest manufacturing locations are typically those with diversified industrial economies.

Maharashtra possesses one of India's broadest industrial bases, spanning:

- Automotive and auto components
- Pharmaceuticals and healthcare
- Chemicals and petrochemicals
- Construction and infrastructure
- Defence manufacturing
- Engineering and industrial manufacturing
- Agriculture and food processing

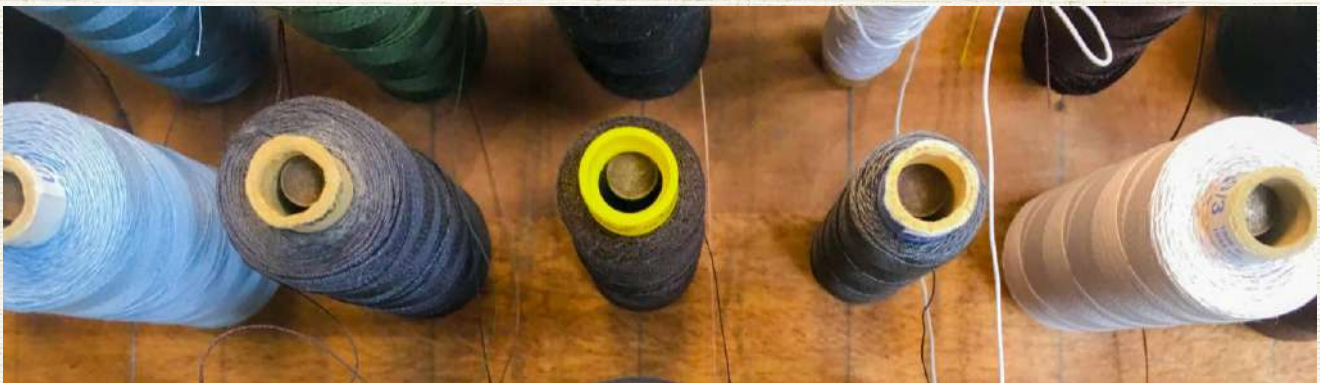
Each of these industries represents a significant end-user of technical textile products ranging from airbags, seat belts and automotive composites to medical disposables, filtration media, geotextiles, industrial fabrics and protective clothing. This diversified demand ecosystem substantially reduces market risks for manufacturers while encouraging continuous product innovation and industry collaboration.

5.5 | Precision Manufacturing: Industry 4.0 Readiness

Technical textiles are precision-driven and functionality-based. India's competitive advantage would depend on its ability to integrate smart manufacturing, automation, traceability and quality control systems. The adoption of Industry 4.0 across the textile value chain could be a breakthrough and a defining factor for global relevance.

5.6 | Institutional Strength: Industry Ecosystem Maturity

The Indian Technical Textile Association (ITTA), with over 300 members, acts as a catalyst in standardisation, industry outreach, and export orientation, emphasising the growing need for India's technical textile ecosystem. They serve as an industry anchor institution with proven expertise, a strong knowledge base, and an extensive network.



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**Dr. T V Sreekumar**

Director
Bombay Textile Research Association
(BTBA)

India has the talent, scientific capability, and industrial base to emerge as a global leader in technical textiles. The next frontier is achieving self-reliance in strategic high-performance fibres such as carbon fibre, aramid fibre, and ultra-high-molecular-weight polyethylene (UHMWPE) fibre, which are indispensable for defence, aerospace, transportation, energy, and advanced industrial applications.

To realize this vision, we must bridge the gap between laboratory research and commercial manufacturing. While significant progress has been made in research, dedicated funding for pilot-scale demonstration plants is essential to validate technologies, reduce scale-up risks, and accelerate industrial adoption. Strategic investments in pilot-scale facilities will transform indigenous innovations into commercially viable technologies, strengthen our manufacturing ecosystem, reduce import dependence, and position India as a global technology leader in high-performance materials

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5.7 | Circularity and Eco-friendly Manufacturing

The adoption of circularity practices has gained momentum, driven by a growing inclination towards environmentally friendly and sustainable manufacturing processes. This can be positioned as a key differentiating factor in global sourcing pipelines. Technical textiles present a unique opportunity to combine advanced manufacturing with circular economy principles through recyclable fibres, industrial filtration products, non-wovens and resource-efficient manufacturing technologies. Maharashtra's policy emphasis on sustainable industrialisation, including support for Zero Liquid Discharge systems, Effluent Treatment Plants and environmentally responsible manufacturing, provides a strong foundation for developing globally competitive green technical textile products.



5.8 | Global Opportunity: Supply Chain Realignment

Innovation is the cornerstone of competitiveness in the global technical textiles industry, where product differentiation is driven by advancements in material science, polymer engineering, functional finishes, and application-specific product development. Maharashtra is well-positioned to lead this transition through its robust innovation ecosystem, supported by premier academic and research institutions such as IIT Bombay, Veermata Jijabai Technological Institute (VJTI), DKTE Society's Textile & Engineering Institute, Institute of Chemical Technology, The Synthetic & Art Silk Mills' Research Association (SASMIRA), and Bombay Textile Research Association (BTRA).

These institutions, together with industry associations such as the Indian Technical Textile Association (ITTA), provide a strong foundation for collaborative research, technology development, product testing, standards, and skill development. Complementing this ecosystem, the Maharashtra Technical Textile Mission (MTTM) seeks to strengthen industry-academia partnerships, promote technology commercialisation, establish testing and certification infrastructure, nurture startups, and develop a future-ready skilled workforce. Collectively, these capabilities position Maharashtra not only as a manufacturing hub but also as a centre for innovation, knowledge creation, and advanced technical textile development.

5.9 | High-Growth Segment Opportunities

One of Maharashtra's most significant advantages lies in its ability to compete simultaneously across multiple technical textile categories. The State possesses strong demand drivers across several high-growth segments.

- Non-wovens and hygiene textiles: Textile segment catering to industry led medical demand across segments such as PPE kits and other medical disposables.
- Mobiltech applications: High performance textile material which is used in automobiles, railways, aircrafts and ships for the enhancement of comfort, durability and safety.
- Geotech and Buildtech products: These are specialized materials and systems designed for infrastructure reinforcement and construction applications.
- Protective textiles: This branch of technical textiles that primarily focus on protection of human body from dangerous environments and external threats and is used by military personnel and fire fighters through its application in helmets, bullet proof vests and other kinds of protective gears.
- Recycled technical fibres: These fibres are generated from chemical processing waste such as plastic bottles, engineered fabrics and industrial waste.

5.10 | Employment Generation

The textile sector contributes significantly to employment opportunities at over 10% of national employment, and technical textiles have the potential to expand to high-quality, future-ready jobs. However, Skill development and specialized training will be a binding constraint. India as a country needs to be built on technical textile specific training through Industrial Training Institutes and Centre of Excellence.

These categories play a crucial role in shifting the country's trajectory from commodity driven exports to value oriented industrial manufacturing which is estimated to generate higher margin, long term relationship with global buyers and a stable industrial demand. With targeted investment in standards, certification, advanced manufacturing and skilling pipelines, technical textiles can become Maharashtra's strongest lever for export upgradation and industrial competitiveness over the next decade.

5.11 | An Integrated Ecosystem Positions Maharashtra to Lead India's Technical Textile Growth

No single factor determines leadership in technical textiles. Global competitiveness emerges when policy, manufacturing, research, infrastructure, skills and market demand evolve together.

Maharashtra possesses the fundamental building blocks not merely to participate in India's technical textile growth story, but to define its next phase of global competitiveness.

Maharashtra brings together these critical enablers within a single, integrated ecosystem. Its diversified industrial base, progressive policy framework, dedicated Technical Textile Mission, proposed Technical Textile Parks, strong research institutions, and proximity to high-growth end-use industries collectively create a conducive environment for innovation-led and export-oriented growth.

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Jaideep Sajdeh
Texool ReFashion

Technical textiles are no longer just an industrial category – they are the next frontier for recycled materials. Converting post-consumer textile waste into high-quality recycled fibre and polyester granules that meet the demands of technical applications, from nonwovens to industrial components. India generates millions of tonnes of textile waste every year, and most of it is lost to landfill simply because the right infrastructure doesn't exist. We are building that infrastructure right here in Maharashtra. Our belief is simple: used textiles are not waste, they are a valuable resource waiting to be unlocked.

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Technical
Textile
Innovation
Centre

06

**Maharashtra's Strategic Focus
Areas for Addressing Key
Industry Challenges**

Section 6

Maharashtra's Strategic Focus Areas for Addressing Key Industry Challenges

Maharashtra is focusing on interventions to address the challenges that technical textiles manufacturers typically face, including market awareness, technology adoption, the development of indigenous raw materials, international certifications, and demand creation in end-use sectors such as construction, agriculture, healthcare, and infrastructure.

Maharashtra's initiatives are strategically focused on addressing the priority areas below:





Infrastructure and Supply Chain Enablement

1. Infrastructure Readiness Needs:

The initiatives are targeted towards improving manufacturing efficiency by addressing the shortage of machinery for manufacturing technical textile products. Technology gaps include the lack of adequate automated and semi-automated garment-making machines, the inability to develop high-tech sensors for high-tech textiles, and inefficient digital printing technology. Ensuring adequate dyeing facilities and stringent pollution norms could accelerate industry growth. The dyeing process for MMF fabrics is complex, requiring long-term investments and innovations.

2. Logistics Complexities:

Efforts are focused on reducing dependency on imported specialty fibers, specialty polymers, carbon fibers, aramids, and specialty chemicals. Transportation and storage requirements for sensitive technical materials, international disruptions, and international risks affect availability and distribution timelines. Furthermore, the ongoing Russia-Ukraine conflict and rising freight costs stemming from disruptions to global shipping routes have severely affected the industry. Raw material and logistics costs can be reduced by ensuring supply consistency through stronger domestic supplier networks. Strategic initiatives to expand market access and diversify export destinations beyond major markets such as the US and the EU are gradually strengthening the resilience of India's technical textiles exports.



Manufacturing and R&D Advancement

1. Technology Enhancement Opportunities:

In the area of technical textiles, interventions are underway to expand technical expertise, strengthen product differentiation and diversification, facilitate technology transfer, optimize production costs, and increase awareness of quality standards. In addition, robust testing infrastructure and certifications could mitigate long-term risks to technology and environmental viability.

2. Quality Competitiveness:

The Government of Maharashtra is focusing on measures to raise quality standards and enhance global competitiveness for products such as Indian polyester filament yarns (PFY), which currently fall short of global standards. Regulatory provisions such as the Quality Control Order (QCO) and import duties on MMF fabrics underscore the need to balance quality objectives with timely access to critical raw materials.

3. R&D Funding:

As the technical textiles sector become increasingly driven by quality and innovation, expanding investment support will be important to accelerate R&D, and commercialization. Competitiveness can be improved by increased funding to support research, development, and entrepreneurship in the manufacturing space.



Skills and Talent Pipeline Development:

1. Skilled Labor Availability:

In India, less than 5% of the workforce in this industry has formal education, professional training, or other formal qualifications, compared to around 65-95% in other developed countries. Similarly, the industry meets challenges, including a shortage of trained entrepreneurs, workers, and skilled trainers. Skilling initiatives aim to fill this gap.

2. Technical Textiles Education:

More industry-academia collaborations can foster a greater number of industry-oriented projects, expand opportunities for students and faculty to gain practical industry exposure, and encourage increased industry support for academic R&D. In addition, enhanced practical knowledge of technical textiles, manufacturing processes, and reverse engineering of products can accelerate the sector's growth.

3. Labour Welfare:

Labour standards and workplace conditions continue to be a key focus area, with targeted policy and workforce welfare initiatives aimed at enhancing employee well-being, fair wages, and productivity in the technical textiles sector.



Global Trade Competitiveness and Market Access:

1. Global Competition:

Countries, especially those in Southeast Asia and China, offer increasingly competitive prices, attractive incentives, and rapid technological progress, underscoring the need to strengthen India's technical textiles sector to maintain an edge in the international market.

2. Trade Policies & Tariffs:

Fluctuating trade agreements and tariff imposition can sometimes affect the ease of exporting textiles, particularly to major markets such as Europe and North America. The uncertainty surrounding these economic policies can stall investment and harm long-range growth prospects. Maharashtra's policies aim to make the Indian technical textiles industry more resilient as global trade dynamics evolve.





ESG and Sustainability Enhancement:

1. Environmental Considerations:

Environmental issues constitute a major challenge. To tackle it, the industry continues to adopt cleaner and more resource-efficient practices. Traditional dyeing processes, for instance, release large quantities of untreated liquid waste into water bodies, impacting aquatic life and contaminating water sources. The industry is under pressure to adopt more eco-conscious practices while guaranteeing these changes do not compromise economic viability. Supportive policy measures, regulatory frameworks, and targeted incentives play a critical enabling role in this scenario.

2. Sustainability and ESG Alignment:

As global brands increasingly focus on sourcing and obtaining materials that meet Environmental, Social, and Governance (ESG) standards, Indian manufacturers have the opportunity to meet higher sustainability targets and enhance their sustainability competitiveness. Continued investment and policy support intend to accelerate this transition.



Marketing Development and Promotion:

1. Awareness among End Users:

Increased awareness of the usage and benefits of technical textile products among end users is essential for greater adoption. As awareness of quality, safety, and hygiene improves, there is growing potential to shift demand towards higher-standard technical textile products alongside cost considerations.

2. Transforming Buyer Choices:

Customer choices are evolving, with increasing demand for comfortable wear and sustainable fashion. Maharashtra is working towards providing better support to Indian manufacturers in adapting to these trends and remaining competitive in domestic and international markets.





07

Roadmap to a Trillion Dollar Opportunity through Viksit Maharashtra 2047 Vision

Section 7

Recommendations: Roadmap to a Trillion Dollar Opportunity through Viksit Maharashtra 2047 Vision

Maharashtra, India's largest state by economy, has been a key state in economic, social, and cultural spheres. The state is home to approximately 13% of India's MSMEs, with the country's largest MSME ecosystem comprising over 90 lakh enterprises. In FY24, the state's merchandise exports totaled USD 60+ billion, accounting for 15% of India's total merchandise exports. Maharashtra is a cornerstone of India's growth story, driven by its vision for 2047.

The technical textiles sector plays a pivotal role in advancing towards the Viksit Maharashtra 2047 vision. Viksit Maharashtra 2047 identifies the sector as one of the state's sunrise sectors with high growth potential²¹. A well-defined, sector-specific roadmap can position Maharashtra as a leader in technical textiles, helping India emerge as a global leader in the sector.

EXHIBIT 3: Focus sectors for Maharashtra



Snapshot from *Viksit Maharashtra 2047 Vision Document*
showing Technical Textiles as one of the 12 Sunrise Sectors

7.1 | Strategy Framework towards Sectoral Leadership

The PLI Scheme for Textiles, with a financial outlay of ₹10,683 crore, aims to encourage large-scale investments in man-made fibre (MMF) apparel, MMF fabrics, and technical textile products.

The three policy Pillars are as follows

7.1

Pillar 1:
Policy and Institutional Support

7.2

Pillar 2:
Collaborative Industry Ecosystem

7.3

Pillar 3:
Innovation and Market Excellence



THREE PILLARS FOR ACCELERATING TECHNICAL TEXTILES GROWTH

01



A. Policy and Institutional Support

- Government policies, institutional frameworks, and regulations play a key role in supporting the industry and enabling a growth environment. Schemes and policies such as the National Technical Textiles Mission (NTTM), the Production Linked Incentives (PLI) for textiles, and PM MITRA Parks have helped sustain growth and modernize the technical textile industry. Further targeted interventions could provide the necessary support to accelerate growth in the country's technical textile sector and enhance India's global competitiveness.



This pillar directly complements the broad theme of **good governance** in the Viksit Maharashtra 2047 Vision, through policy reforms, ease of doing business, export promotion strategies, and institutional enablement.

02



B. Collaborative Industry Ecosystem

- A sync between industry stakeholders such as key industry players, manufacturers, exporters, startups, research institutions, and end-user sectors is necessary to accelerate innovation, effectively cater to market demand, and enable widespread adoption. Developing this synergy through knowledge exchange, value chain integration, and healthy competition will create a collaborative ecosystem for technical textiles in which stakeholders can thrive.



This pillar directly complements the core priorities of **industry-led growth and skill development** in the Viksit Maharashtra 2047 Vision, which include initiatives to integrate value chains, establish industrial townships, strengthen MSMEs through a market-linkage mechanism, build a credit enhancement network, and create a sustained talent pipeline.

03



C. Innovation and Market Excellence

- As a sector driven by product performance, functionality, and quality, the sector will leverage technology and innovation to develop high-value, application-specific products that meet evolving global standards. By playing on India's manufacturing strengths and focusing on key growth areas such as precision manufacturing, sustainable and circular production, advanced materials, and quality excellence, the Indian technical textile sector can make its global value proposition more attractive and establish India as a global hub for high-performance technical textiles.



This pillar directly complements the core priorities of **sustainability and technology leadership** in the Viksit Maharashtra 2047 Vision, covering areas such as industry-linked R&D, sustainable manufacturing, green industrialization, and productivity and quality improvement through innovation hubs and R&D funds.

7.2 | Policy Interventions to Operationalize the Strategic Framework

Maharashtra can leverage its strengths, such as a strong industrial base, sector ecosystem, and manufacturing capabilities, to enable a competitive technical textiles sector. Building on the strategic framework, the following policy interventions and actions could help to strengthen Maharashtra's position as a leading contributor, accelerate towards the Viksit Maharashtra 2047 vision, and eventually contribute to India's global leadership in technical textiles.



Institutionalising the use of technical textiles in other sectors such as infrastructure and agriculture projects

The Viksit Maharashtra 2047 Vision promotes integrated, cross-sectoral development across multiple sectors, including agriculture, healthcare, and infrastructure, through its 16 themes. As a cross-cutting enabler across multiple sectors, technical textiles can play a pivotal role in advancing these priorities.

India's near-term opportunity is concentrated in six high-impact segments: Meditech, Mobitech, Geotech, Buildtech, Agrotech, and Protective textiles.

Products, especially for these high-impact segments, can be integrated into project design standards and procurement guidelines across infrastructure, agriculture, and public sector programs to accelerate domestic adoption and create stable market demand. This can act as a catalyst for large-scale domestic adoption of technical textiles and application-focused R&D, which can further improve economies of scale and drive private investment by creating predictable market demand.



Strengthening domestic manufacturing of specialty fibres and performance materials

Viksit Maharashtra 2047 vision aims to unlock accelerated growth and investment in the private sector. One of the ways described is to enable global leadership for domestic industries and entrepreneurs by focusing on sunrise sectors, to which technical textiles are classified.

Introducing targeted policy incentives to support domestic production of high-performance fibers, specialty polymers, and engineered materials required for technical textile applications would reduce import dependence and strengthen upstream value chains.

Additionally, policy incentives could be designed to boost circularity and sustainability by promoting the development of innovative, eco-friendly materials and rewarding the adoption of ethical green production practices, thereby strengthening compliance with global Environmental, Social, and Governance (ESG) expectations and improving market acceptance.



Establishing a global compliance facilitation mechanism for technical textile exporters

As per the Viksit Maharashtra 2047 vision, strengthening compliance capabilities and facilitating access to international markets are critical components.

A coordinated platform dedicated to technical textiles can be created to support manufacturers in meeting international regulatory and product compliance requirements, improving export readiness, and enabling Indian firms to access regulated global markets.

The platform will act as a guide to help navigate global regulations, recommend certifications, and provide market intelligence, which will, in turn, enable manufacturers and suppliers to meet global requirements and access international markets seamlessly.

This would not only align all industry stakeholders to improve export readiness and product credibility but also strengthen India's position in global value chains..



Developing a specialised technical textile skill pipeline aligned with industrial demand

Viksit Maharashtra 2047 vision includes 'Facilitating job creation' and 'Accelerated industrial growth' as major opportunity areas, which focus on facilitating workforce participation through adequate reskilling and improving access to skilled talent for businesses, respectively.

To support workforce needs for advanced textile manufacturing, India can strengthen industry-academia collaboration by introducing industry-aligned training programs across Industrial Training Institutes (ITIs), polytechnics, and textile institutes, with a focus on non-woven technologies, advanced materials, composites, and functional textile applications.

As the government recently introduced six additional courses for technical textiles in its skill development program, SAMARTH, aligning these courses with industry skill requirements, increasing participation, and expanding the curriculum into more domains and advanced roles are necessary.





Enhancing Research and Development capabilities for technical textile design and product development

Viksit Maharashtra 2047 vision identifies Industry (Smart Infra Parks and R&D centers) as one of the 16 recurring themes at the state and district levels, identified from the Voice of the Citizen. Within the Industry theme, R&D remains one of the 7 key initiatives, emphasizing industry-led R&D, the promotion of breakthrough innovations in emerging technologies, and sector-specific Centres of Excellence.

As product performance, functionality, and reliability are key drivers of competitiveness in the technical textile industry, research and development (R&D) is critical to the sector's growth. Under the National Technical Textile Mission (NTTM), 74 research proposals valued at US\$ 28.27 million (Rs. 232 crore) have been approved in the category of specialty fiber and technical textile, which shows the government's strong commitment in this space.

Expanding capabilities of the existing innovation hubs, centers of excellence (COEs), and incubation centers through pilot manufacturing infrastructure, certification support, Intellectual Property (IP) assistance, and access to venture capital will accelerate the development of innovative products and enhance quality standards, which will further strengthen India's export competitiveness, promote import substitution, and position India as a global hub for advanced technical textiles.

The above interventions will help close gaps and address current challenges, thereby strengthening Maharashtra's technical textiles ecosystem. By unlocking the sector's full potential, their effective implementation will be key to moving closer to the Viksit Maharashtra 2047 vision and advancing India's journey towards global leadership.



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महाराष्ट्र शासन

About Textiles Department

The Department of Textile, Government of Maharashtra comes under the aegis of Cooperation, Marketing, and Textile Department and is responsible for the development and promotion of the textile industry in the State. The Department plays a significant role in implementing schemes and programs that have helped improve the quality of textile products in Maharashtra and create employment opportunities in the industry. The Department is committed to further developing the textile industry in Maharashtra with a strong presence of both traditional and modern textile sub-sectors and aims to make the state a global hub for textiles.

The Department is assisted by its field offices, namely the Commissionerate of Textiles and the Directorate of Sericulture located in Nagpur.

The textile industry is a major driver of economic growth in Maharashtra, and it is expected to continue to grow in the coming years. The state government is committed to support the growth of the industry and has put in place several policy initiatives to help its beneficiaries remain competitive in the global market.

Vision

To develop, regulate and promote an integrated, sustainable, and advanced Textiles sector in Maharashtra, progressively realizing the 5F vision of the Government of India – Farm to Fiber to Factory to Fashion to Foreign.

Mission

To leverage and advance the current position of Maharashtra towards becoming a leading national and global player in the Textiles and Apparel sectors.



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About Primus Partners

Primus Partners has been set up to partner with clients in 'navigating' India, by experts with decades of experience in doing so for large global firms. Set up on the principle of 'Idea Realization', it brings to bear 'experience in action'. 'Idea Realization'— a unique approach to examine futuristic ideas required for the growth of an organization or a sector or geography, from the perspective of assured on ground implementability.

Our core strength lies in our founding partners, who are goal-oriented professionals with extensive hands-on experience and deep subject-matter expertise, widely recognized across the industry. Led by seasoned industry leaders with experience in global organizations, Primus Partners has a team of over 350 consultants and advisors, representing some of the finest talent in the country.

The firm has a strong presence across multiple cities in India, as well as in the UAE, the Kingdom of Saudi Arabia (KSA), and the United States (USA). In addition, the firm has successfully executed projects across Africa, Asia Pacific and the Americas.



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About Indian Technical Textile Association (ITTA)

The Indian Technical Textile Association (ITTA) is the only association of the Technical Textile Industry in India covering all 13 segments, including Composites. The office of the Textile Commissioner, Ministry of Textiles, Government of India facilitated the formation of ITTA in January 2010. The objective of ITTA is to promote, support, develop and increase the production, consumption, and export of technical textiles to make India a powerhouse of technical textiles in the days to come.

ITTA has nearly 400 members, including members from EU & Japan and representing the entire technical textile value chain from raw material to finished goods producers, machinery manufacturers, consultants, centers of excellence and R&D/Academic institutions.

ITTA represents Different Committees of Ministry of Textiles, GOI such as Inter-Ministerial Steering Committee (IMSC), Technical Advisory-cum-Monitoring Committee (TAMC) & Internal Technical Committee (ITC) under ATUFS, Mission Steering Group (MSG) & Empowered Programme Committee (EPC) under NTTM and takes up various industry issues to state & central govts. ITTA is a member of the Working Group on Sustainability Strategies and World Class Conformity Assessment Ecosystem for Technical Textiles formed by the Textile Committee. ITTA is member of ten BIS Sectional Committee on Technical Textiles and Speciality Fibres and introduced several domain expert members to different BIS sectional committees. ITTA regularly organizes National & International level Conferences & Exhibitions Symposiums & Workshops.

ITTA successfully organised Three National Conclaves on Protective Textiles, Sports Textiles and Agro Textiles supported by NTTM, MoT and also regularly organizing the Executive Development Program (EDP) on key segments of Technical Textiles for the skilled manpower development for the industry.

ITTA is now connected with international and national organizations viz. Taiwan Technical Textiles Association (TTTA), Taiwan; Textile Institute (TI), Manchester, UK; Association of Italian Textile Machinery Manufacturers (ACIMIT), Milan, Italy; Safety Appliances Manufacturers Association (SAMA), India and EDANA, Belgium to promote Technical Textiles in India and to create a common platform to share knowledge.





महाराष्ट्र शासन



वीण समृद्धीची

